

**XVIII Airborne Corps and Fort Bragg Legal Assistance  
WILL WORKSHEET**

***\*\*Please Print Legibly and Fill Out Completely\*\****

1. Full Name (first, middle, last): \_\_\_\_\_ → Are you deploying soon? **Yes / No**  
SSN (Last Four): \_\_\_\_\_; Rank: \_\_\_\_\_; Military Unit (if applicable): \_\_\_\_\_

2. State of Legal Residence: \_\_\_\_\_ Email: \_\_\_\_\_

3. Full Street Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_  
Cell Phone: \_\_\_\_\_

4. Military Status: \_\_\_ Active Duty; \_\_\_ Retired; \_\_\_ Family Member; \_\_\_ Deploying Civilian; \_\_\_ Reserve/National Guard

5. Marital Status: \_\_\_ Single; \_\_\_ Married; \_\_\_ Widow(er); \_\_\_ Divorced (Name(s) of divorced spouse(s)): \_\_\_\_\_

6. Name of Spouse (first, middle, last): \_\_\_\_\_ → Spouse's SSN Last Four: \_\_\_\_\_

7. Names (first, middle, last) & Ages of Children: Please circle (N) natural, (A) adopted, (S) stepchild;

_____	Age: _____	N A S	_____	Age: _____	N A S
_____	Age: _____	N A S	_____	Age: _____	N A S
_____	Age: _____	N A S	_____	Age: _____	N A S

8. **Estimated Value of Your Estate:** Include all *life insurance proceeds, real estate, personal property* and *value of investments* (IRAs, mutual funds, stocks, etc.). If you are married, *include the combined value of you and your spouse's estate*: \$ \_\_\_\_\_

- Do you own any interest in a family owned **farm or business**? **Yes / No**
- Do you own any **real estate** (land, house)? **Yes / No** If yes, in what state(s)? \_\_\_\_\_
- Do you want to give your **real estate** to: \_\_\_ a specific person or persons; *or* \_\_\_ to the beneficiaries listed below in Section 9?
  - Specific person(s): \_\_\_\_\_

9. **BENEFICIARIES:** Who do you want to have your property after your death?

\_\_\_ All to spouse, and if spouse dies first, then all to my children (*go to section 9(a) below if checked*)

\_\_\_ Other: List by name, relationship (i.e. brother, friend, mother-in-law, etc.) and the percent they are to receive.

Name: _____	Relationship: _____	Share _____ %
Name: _____	Relationship: _____	Share _____ %
Name: _____	Relationship: _____	Share _____ %
Name: _____	Relationship: _____	Share _____ %
Name: _____	Relationship: _____	Share _____ %

9(a). If one of beneficiaries listed above dies before you, who do you want to receive that person's share:

\_\_\_ the children of the deceased beneficiary; *-or-* \_\_\_ the surviving beneficiaries specifically named above; *-or-*

\_\_\_ someone else: Name: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

9(b). Do you have something you want to expressly give to someone (i.e., a specific bequest)?

Item(s): \_\_\_\_\_ Beneficiary: \_\_\_\_\_  
Item(s): \_\_\_\_\_ Beneficiary: \_\_\_\_\_

9(c). Do you want to expressly **disinherit** someone (i.e., give someone NOTHING on purpose)?

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

**EXECUTOR / PERSONAL REPRESENTATIVE**

Who do you want to gather the assets of your estate, pay off your bills, and distribute what is left over to the beneficiaries you choose? You may choose your spouse or anyone else. You should choose someone you can trust and who is mature enough to carry out this important task. [*The following states may require your Executor to be a resident of that state unless your Executor is a close relative: AL, FL, IN, KS, OH, TN, VA, WV.*]

Primary: _____	Relationship: _____
Alternate 1: _____	Relationship: _____
Alternate 2: _____	Relationship: _____

***\*\*continued on back\*\****

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**GUARDIAN OF YOUR MINOR CHILDREN**

If you have a child(ren) (natural or adopted) under the age of 18 you have the opportunity to nominate individuals to raise your child(ren) if both you and the other parent die before the child(ren) reach the age of 18. [*The states of AL, FL, GA, IN, KY, OH, TN, and WV may require that guardians live in that state, unless the named guardian is a close relative.*]

Primary : \_\_\_\_\_ Relationship: \_\_\_\_\_  
Alternate: \_\_\_\_\_ Relationship: \_\_\_\_\_

\*\*\*Be sure to notify your legal assistance attorney if any child has special needs or is receiving any benefits due to a disability\*\*\*

**PROVIDING FOR YOUR CHILDREN**

***You will be given two options to provide financially for your children under your will.  
Your legal assistance attorney can discuss both of these options in further detail if  
you should have any questions about the selection that is best suited for you.***

**OPTION #1**

**EXPRESS TRUST:** If you are leaving your estate to children, you may include language in your Will that designates a Trustee who will have discretion over the money (this person may or may not be the same person you designated above to be the Guardian of your children). The person that you designate as Trustee can utilize funds in the Trust for education expenses like college, medical emergency, maintenance or even support for your children. However, the bulk of the funds will be held in trust for your children until they reach an age of your choosing or split into equal portions as suggested below. In addition, the Trustee can be listed as the person to receive your SGLI benefits to hold those funds *in Trust* for the benefit of your children.

If you select this option, you can decide at what age(s) your children will receive the remaining funds held in Trust (check one):

\_\_\_\_\_ (1/3 at 21, 1/3 at 25, 1/3 at 30)      \_\_\_\_\_ (1/3 at 25, 1/3 at 30, 1/3 at 35)      \_\_\_\_\_ or all at age:

My trustee will be: Primary: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Alternate: \_\_\_\_\_ Relationship: \_\_\_\_\_

**OPTION #2**

**UGMA/UTMA:** If you are leaving your estate to children under the age 21, you may include language in your Will giving your executor discretion over the money. This allows the executor to give the money (all at once or periodically) to the guardian for the benefit of the child and/or hold it until the child reaches a designated age (18-21). Under this option, the executor does not have any discretion when the child reaches the designated age (18-21), regardless of the maturity level of the child, and **MUST** disburse any remaining funds to the child at that time.

If you decide to choose this option, your executor will manage the money until your child/children reach the age (circle one):

18      19      20      21

***It is also necessary to discuss with your legal assistance attorney how SGLI (or any other life insurance) should be coordinated with your will, particularly the provisions pertaining to your children. Your attorney can provide guidance on any changes that may need to be made to your SGLI election form.***